#### FOOD SERVICE SPECIALIST SECOND CLASS COURSE

#### **PROCUREMENT**

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#### QUESTIONS ABOUT THIS TEXT SHOULD BE ADDRESSED TO THE SUBJECT MATTER SPECIALIST FOR THE FOOD SERVICE SPECIALIST RATING

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#### **Notice to Students**

Introduction	This course book is designed to introduce you to Routine Coast Guard procurement transactions.

#### Objectives After completing this course book you'll be able to:

- Prepare a Procurement Request
- Prepare a Request for Quotations
- Prepare an Amendment of Solicitation/ Modification of Contract (SF-30).
- Construct a basic Acquisition Instrument Identification # (AIIN)
- Construct and interpret DAFIS document #'s and prepare accounting strings

In addition you'll be able to execute a small purchase procurement using the following small purchase procurement methods.

- Purchase Orders (CG-5398, OF-347,SF-44)
- Imprest Funds (SF-1165)
- Government wide Commercial Credit Cards
- Blanket Purchase Agreement (CG-5398,OF-347,OF-348

#### **Notice to Students, Continued**

#### References

To complete this course book you'll need the following manuals:

- Small Purchase Handbook (M 4200. Series)
- LUFS User Manual
- USCG Finance Center Standard Operating (FINCENSTINST M7000.SERIES)
- Coast Guard Acquisition Procedures(CGAP)
   (COMDINST M4200.series)
- Certifying and Disbursing Manual (COMDINST M7210.series)

#### **Forms**

You'll need the following forms to complete this course book:

- Request for Quotations (SF-18)
- Amendment of Solicitation/Modification of Contract (SF-30)
- Order of supplies or services(CG-5398, OF-347)
- Receipt for Cash Subvoucher (SF-1165)
- Procurement Request (DOT F 4200.series)
- Order for supplies or Services Schedule
   Continuation Sheet (OF-348)
- Purchase Order-Invoice-Voucher (SF-44)

#### **Notice to Students, Continued**

#### READING ASSIGNMENT

Before you begin this course book, you should expose yourself to basic procurement rules and regulations. **YOU Must Read** Chapters 1-5 of the SMALL Purchase Handbook before beginning:

You will be called upon to refer back to these references throughout the course.

# Learning Advice

This course book is designed to walk you through each section. Don't skip around! Follow the instructions and you shouldn't have any problems. If you discover any problems, consult your supervisor for clarification. Or call the Food Service course writer. (707-765-7142)

#### Important Note

This text has been compiled for **Training Only.** It should **Not** be used in place of official directives or publications. You should, however remember that it's your responsibility to keep up with the latest professional information available for your rating. The current information for individual qualifications are listed in the Enlisted Qualifications Manual, COMDTINST M 1414.8(series).

# Practice Exercises

You will be given a practice exercise for preparing cycle menus & load guides. Prior to starting each exercise, you should contact your supervisor and research standardized Coast Guard requirements. Clearly understanding the requirements will prevent you from becoming discouraged.

continued on the next page

#### **Notice to Students, Continued**

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# End Of Course Tests

If properly used, the practical exercises included in this course will assist you for preparing for your EOCT. You must understand and comprehend all of the material to pass your the EOCT. You must achieve a score of 80% or better to successfully complete this course. Taking time to review this material prior to the EOCT is advisable.

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# Service Wide Exam Study

Servicewide examination questions for your pay grade and rating are base on the Professional and Military Requirements sections of the Enlisted Qualifications Manual, COMDTINST M (1414.8)series. Using the references in this course and reviewing all sections for your rating in the Enlisted Qualifications Manual will help you prepare for the servicewide exam.

#### PQS Format

This course is a self study Performance Qualification Standard (PQS) style course. It provides pertinent information needed to meet the objectives of each chapter. In addition, it provides a list of references that you can use to obtain additional information about the subject, and that you must use to complete the exercises. The PQS format that helps you to perform the objectives. It combines the performance, skills, and knowledge required for you to qualify for advancement.

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#### **Chapter 1**

#### **DAFIS Accounting**

Introduction DAFIS is an acronym for Departmental Accounting Financial Information System. The Secretary of Transportation mandated that all departmental agencies convert to DAFIS approved accounting on April 1, 1987.

Standard Document Number Standard document numbers are used to identify and track procurements.

Reading Assignment Read pages 5-1 through 5-4 in the FINCEN SOP.

Note: For this exercise the suffix and sequence numbers are included as part of the DAFIS Accounting Line. However, you <u>CANNOT</u> add these numbers as they are included by the FINCEN.

Practice #1

Using the following scenarios and your reading assignment as a reference, create a standard DAFIS document number. Use fiscal year 95, the program element given, and the document sequence number given:

FS1 Fiori, on board the USCGC NORTHWIND (D-11), is issuing a cash subvoucher to purchase milk. The program element is NW and the document sequence number is 101. Enter the correct standard document number on the line below.

Response:	
•	Go to page 4-1 for feedback

Practice #1 Continued

- FS2 Rollings, on the USCGC REVENGE (D-7 MLC LANT unit) is preparing a SF-44 to purchase doughnuts from a local vendor. The program element is RV and the document sequence number is 718.. Enter the correct standard document number on the line below.
- FSC Ith of Group Mobile (a D-8 unit) is preparing a purchase order to purchase produce. The program element is GM and the document sequence number is 912. Enter the correct standard document number on the line below.

• FSCMcGraw of Base Honolulu (a D-14 unit) wants to set up a blanket purchase order with the local vendor. The program element is BH and the document sequence number is 011. Enter the correct standard document number on the line below.

#### DAFIS Nonstandard Document Number

There are times when the DAFIS standard document number format is inadequate to document a financial transaction. In cases like this, the DAFIS nonstandard document number format is used.

#### References

Listed below are financial transactions which require nonstandard document numbering, along with the reference in the FINCEN SOP.

Transaction Type	Page #
• Government wide Commercial Credit Card	12D-99
• Express Mail/Air Freight	12D-111
GSA Customer Service	12E-25
• MILSTRIP	12E-1

For MILSTRIP you must also read the Supply Policy and Procedures Manual Part II chapter 5

#### Practice #2

Create nonstandard document numbers using the references listed above and the scenarios listed on the following page.

Practice	#2
continu	ed

• Today is August 31, 1995. FS2 Gonzales ordered subsistence supplies with a government VISA card. The vendor is shipping the items today. The VISA card number is 3762928343. The bank's transaction sequence number is 1221\*. Write the nonstandard document number for the above transaction on the blank line below.

\*added by FINCEN in DAFIS

• Today is March 4 1995. FSCS Peters shipped a DFOS using Federal Express. The carrier's airbill number is R927523845, the suffix is 112\*. Write the nonstandard document number for the above transaction on the blank line below.

Write the correct DAFIS nonstandard document number for MILSTRIP document number Z2076458930123, on the blank line below.

# Practice #2 continued

Write the correct DAFIS nonstandard document number for the below listed GSA customer service order scenario.

Julian Date: 275 OPFAC: 15222

Ticket #: 98654098

Go to pages 4-2 for feedback

#### **AIIN**

The Acquisition Instrument Identification Number (AIIN) is used to identify a commercial procurement document. Commercial vendors will reference this number on their invoices for payment of supplies of services rendered to the Coast Guard.

#### Reference

Read CGAP page 4-1 through 4-3, (part 1204.602) in the Coast Guard Acquisition Procedures Manual (COMDTINST M4200.19D). You should also refer to page 5-1 through 5-4 in the FINCEN SOP concerning the standard document number crosswalk.

Practice #3	Create AIIN numbers using your references and the below document numbers and document types:					
	<u>21 95 49 5 3TR043</u> BPA Supply Fund 82					
	AIIN Number Response:					
	21 95 27 5 CGR112	Purchase Order UNICOR				
	AIIN Number Response:					
	21 95 27 5 LY3235	Delivery Order				
	AIIN Number Response:					
	21 95 30 5 RSC098	Agreement				
	AIIN Number Response:					

Go to page 4-3 for feedback

Practice #4	Create an AIIN for each scenario below. Use the FINCEN SOP and CGAP as references.
	• The year is 1997. FS2 Perkins is aboard USCGC Point Doran (a D-13 unit) and issues a Purchase Order for program element PD, using document sequence number 404.
	Response:
	• The year is 1996. FSCS Malathion is attached to USCG Support Center Portsmouth (a D-5 unit) and is preparing a delivery order for produce. The program element charged for this transaction is PH, and the document sequence number is 013.
	Response:
	• The year is 1996. FS2 Pearson, attached to the USCGC RELIANCE (a MLC LANT unit), is typing a Request for Training (SF-182) The program element used is RL and the document sequence number is 642.
	Response:
	• The year is 1997. FS1 Prose, attached USCG Base Honolulu (a D-14 unit), is preparing a blanket purchase agreement. The program element is HL, and the document sequence number is 202.
	Response:
	Go to page 4-4 for feedback

## **Accounting** Line

Each unit in the Coast Guard has a unique accounting line. The accounting line tells what account is going to be charged or credited for a particular transaction. Any document that requires an exchange of funds will have an accounting line.

#### Reading Assignment

Read pages 4-1 & 4-2 in the FINCEN SOP.

Practice #5	Label the fields of the accounting line below.					
	2/L/XS6/111/82/0/PE/14502/2617					
	(1) (2) (3) (4) (5) (6) (7) (8) (9)					
	1					
	2					
	3					
	4					
	5					
	6					
	7					

Go to page 4-5 for feedback

## Chapter 2

#### **Commercial Procurement**

#### Introduction

In this section you'll learn to prepare the following forms to complete small purchases:

- Procurement Request (DOT F 2400.series)
- Order for Supplies or Services (CG-5398, OF 347)
- Receipt for Cash-Subvoucher (SF-1165)
- Request for Quotations (SF-18)
- Amendment of Solicitation/Modification of Contract (SF-30)

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#### **References**

You'll need the following manuals to complete this section:

- Small Purchase Handbook (COMDTINST M4200.series)
- Coast Guard Acquisition Procedures (COMDTINST M4200.series)
- USCG Finance Center Standard Operating Procedures (FINCENSTFINST M7000.series)
- Certifying and Disbursing Manual (COMDTINST M7210.series)

- Read pages 12D-11 through 12D-14 in the Finance Center Standard Operating Procedures.
- You must have read Chapter 5 in the Small Purchase Handbook to continue.

#### Procurement Request (DOT F 4200.series)

The Procurement Request (PR) is the first step in the procurement process. It's prepared by the person who is requesting small purchase action.

# From a PR to a Document Type

Remember that all **PR's** originate as a **DOC TYPE 21**. However, **DOC TYPE 21's** will change to the final purchase document type, upon transferring the purchase request.

For example, **DOC TYPE 21** will change to **DOC TYPE**:

- 26 for dining facility documents.
- 32 for Government wide Commercial Credit Card (I. M. P. A. C.)
- 33 for meal tickets (DD-652)

#### References

You should reference the reverse side of the (PR) and pages 12D-11 through 12D-13 in the FINCEN SOP for form preparation instructions. You may also refer to Chapter 2 of the Small Purchase Handbook for instructions on preparation of the PR.

Practice #1

Prepare a Purchse Request (PR) using your references and the following scenario. You've been instructed to prepare a procurement request to order Dishwashing supplies. The following information applies.

Economics Laboratories
 2041 Coronado Parkway, Portland, OR 95954

Phone: (808) 764-7834

POC: Bill Walters

- Soil Master Dishwashing Detergent 13 Cases 143.00 per case Item Number D717634454
- Jet Dry Wetting Agent
  8 Cases
  \$32.00 per case
  Item Number W272643
- Person to contact: FS2 your Name
- Originating office data: Galley X8381
- Procurement request number: 21-95-30
- Program Element CB
- Date Received: 02 June 1995
- This is a new request
- Destination: Officer in Charge (FSO)

U.S. Coast Guard Station Coos Bay, Oregon 94954

Attn: FS1 Janson

Date required: June 15, 1995

• Approving officials: (1) FS1 Janson

(2) BMCM J. Donovan

\* both will sign on May 15, 1995

• Accounting Data: 2/S/501/113/30/0/ZZ/30478/2634

• GSA Contract # GS-OOF-8012 Expiration date: 30 SEP 1999

• FOB: Destination

• Delivery Terms: 30 days ARO

• Payment Terms: Net 30 days

Go to page 4-6 for feedback

#### Purchase Order Invoice-Voucher (S F-44)

The SF-44 is a form designed for on the spot, over the counter purchases of supplies and non-personal services. The order number should be separated with a dash after the fourth and seventh position, this change improves the readability of the document.

#### Reading Assignment

Read Chapter 5 pages 14-15 in the Small Purchase Handbook. You may also refer to pages 12D-14 through 12D-19 in the FINCEN SOP for form preparation instructions.

#### Dollar Limitation

Except for purchases made under unusual and compelling urgency, the amount of purchase must not exceed the limitation, as per the Small Purchase Handbook COMDTINST M4200.13 series.

Practice #2 Prepare an SF-44 to purchase the items on PR 26972877RM138 seen below. Date the SF-44 May 14, 1997. SKC J. R. Peeves (contracting officer) will sign the SF-44.

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Go to page 4-7 for feedback

#### Receipt for Cash-Subvoucher (SF-1165)

The Receipt for Cash-Subvoucher (SF-1165), or a Purchase-Order-Invoice-Voucher (SF-44), is used to obtain cash from an Agent Cashier to make a cash purchase.

#### Reading Assignment

Read the following manuals for reference material:

- Pages 12D-6 through 12D-10 in the FINCEN SOP
- Chapter 5 page 13 in the Small Purchase Handbook
- Pages 2-49 through 2-51 in the Certifying and Disbursing Manual

# SF-1165 (continued)

Follow the instructions below and refer to the example on the following page to prepare the SF-1165.

Field #	Enter the
1	subvoucher number (This number is unit
	assigned).
2	Date money is received.
3	Unit issuing the money.
4	Total dollar amount.
	<b>Note</b> : You must type two asterisks before the dollar amount and asterisk fill to the right.
5	Amount in cents.
6	Total of purchase.
7	Quantity and unit of issue.
8	Item description and price.
9	Item extended price.
10	Vendor's address.
11	Contracting officer's name, and project code of the department whose account is charged for the item.
12	Accounting line and DAFIS document number.

SF-1165 (continued)

Example
SF-1165
(continued)

INTERIM RECEIPT FOR CASH	Provided and Transport of the Control of the Contro	(To be used when Received in cash from USC)	ASH-SUBVOUCHER  GC IRIS (WLB 395)  and 5 05 (\$6 \$40.05 ) for the	① 15-97 5 Sep 97
DATE  Received of Imprest Fund Cashier	QUANTITY  (7) 15 LB	ARTICLES  B) Red Snapper	OR SERVICES \$2.67	AMOUNT (9) \$40.05
MOTE TO MINIST  Be sure this resulpt to marked "VOED" and returned to you when the tremention is completed or the fund returned to the Cashier.  VA GPAR SECTION	Address 425 ( Astor	and Fish Co.  COMMERCIAL STREET  ia, OR. 97654  ROJECT, LUNCH  Murhpy SKC, USCG	Title	2617

Practice #3 Prepare an SF-1165 to purchase the items on PR 2697217RL212 seen below. Date the SF-1165 July 31, 1997. SKC M. P. Richards (contracting officer) will sign the SF-1165. Utilize Subvoucher No.# 104-97

READ INS	TAU	спо	MS O	N/	PAGE 2											PAGE	1 <b>OF</b>	PAGE
DEPARTMENT OF TRANSPORTATION										PRO	CUREMEN	REQUEST NO	<b>3</b> .					
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Go to page 4-8 for feedback

#### Order for Supplies or Services (CG-5398, OF-347)

The Order for Supplies or Services (CG-5398, OF-347) is a multipurpose form used for the following:

- Negotiating purchases of supplies or services not in excess of the small purchase limit.
- Ordering or scheduling deliveries against established contracts or from government sources of supply in any dollar amount.
- A receiving report.
- An invoice.

#### Reading Assignment

Read the following manuals for references for the CG-5398, OF-347:

- Pages 12D-50 through 12D-55 in the FINCEN SOP.
- Chapter 5 pages 17-26 and enclosure 4 in the Small Purchase Handbook.

#### OF-347 Preparation

Follow the instructions below and refer to the following page for preparation of the OF-347:

Block	Enter
1	Date purchase order is prepared.
2	GSA contract number if applicable.
3	AIIN number.
	Ref: CGAP 1204.602-90
4	Requisition /reference number.
	Ref: FINCEN SOP 5-1 through 5-4
5	Issuing office.
6	Address where supplies are to be shipped.
7	Vendor name and address.
8	Type of order
9	Appropriate accounting data.
	Note: Refer to page 4-2 in FINCEN SOP for an example of multiple accounting lines.
10	Name, office, and phone number of person who initiated the order for supplies.
11	Appropriate business classification
12	FOB (free on board) point.
	Example: In this case FOB destination indicates that the vendor will be responsible for shipping charges until supplies reach the destination point.
13	Place where supplies will be accepted and inspected.
14	GBL number (if applicable)
15	Date when supplies should be delivered to the FOB point.
16	Any discount terms.

Example OF-347 Preparation (continued)

		ORDE	R FOR	SUPPLIES (	DE SERVI	CES		PAGE	OF PAGES		
MPORT	ANT: MARK A	LL PACKA	GES AND P	APERS WITH C	ONTRACT AND	VOR ORDE	20 M2 42 52 5	1	3		
DATEO	F ORDER	2. CON	TRACT NO.	(If any)	3. ORDER			Of the transport			
23 Feb	19 <del>9</del> 7	1	OF-9034B		1	-97PKN12		QUISITION/REPER 772775KN121	LENCE NO.		
	ACTING OFF	CER an	d ZIP Code)		6. SHIP TO:	(Consignee CONTRA	and address ZIP Code) CTING OFFICER				
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	BY (Signature						•				

#### OF-347 Preparation (continued)

Block	Enter
17a	Item number.
17b	Description of supplies or services you are ordering.
17c	Quantity you are ordering.
17d	Unit of issue for each item.
17e	Unit price of each item.
17f	Extended price for each item.
17g	Quantity accepted.
18	Shipping point.
19	Gross shipping weight.
20	Invoice number.
21	Finance Center address.
	Ref: pages 12D-20 and 12D-21 in the FINCEN SOP
22	For contracting officer's signature.
23	Complete name and title of contracting/ordering officer.

#### OF-347 Preparation (continued)

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OPTIONAL FORMS47 (10-83) Prestided by G4A FAR (48 C FR) 53.213(4)

#### **Practice #4**

You're the FS2 at Station Ft. Pierce Florida. Prepare an OF-347 to purchase the items on **PR 21972877FP314** seen on the following page. The following applies

- Date the OF-347: 25SEP1997
- M.D. Zimms (contracting officer) will sign the purchase order.
- Mary's Cake Decorating Supplies is a woman owned business.
- The address of the contracting officer at Station Ft. Pierce Florida

Contracting Officer USCG Station Ft. Pierce Panama City, FL. 86754-0030 Phone: (211) 845-3089

• The ship to address is:

Contracting Officer USCG Station Ft. Pierce 234 Crabtree Road Panama City, FL 86754-0030

# Practice #4 continued

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PREVIOUS EDITIONS ARE OBSOLETE

Go to page 4-9 for feedba

#### Blanket Purchase Agreement

A Blanket Purchase Agreement (BPA) is a method of filling repetitive needs for small quantities of related supplies or services by establishing "charge accounts" with established sources of supply.

#### Reading Assignment

Read the below listed manuals for information regarding rules and regulations for BPA's:

- You must have read chapter 5 in the Small Purchase Handbook
- Pages 12D-50 through 12D-55 in the FINCEN SOP

Note: Enclosure 6 in the Small Purchase Handbook includes a BPA instruction letter for Subsistence Specialists.

Practice #5	Complete the following statements using your reading assignment as a reference:
	<ul> <li>When placing a call against a BPA, the authorized caller must assign a</li> </ul>
	<ul> <li>As the vendor supplies the material to the unit, he/she must also provide a</li> </ul>
	<ul> <li>All calls against a BPA must be recorded on a and submitted to Finance Center with delivery tickets</li> </ul>
	GO to page 4-10 for feedback

# -wide

**Government** The Government-wide Commercial Credit Card is a procurement tool utilized for small purchases based on the individual Commercial cardholder's procurement authority. It can be used in lieu of cash, **Credit Card** BPA's, SF-44's and purchase orders.

#### **Reading Assignment**

For information on procedures, rules and regulations regarding credit card purchases, read the following references:

- You must read Chapter 5 in the Small Purchase Handbook
- Pages 12D-99 through 12D-110 in the FINCEN SOP

#### Practice #7

You are stationed at TRACEN Petaluma. Using the IMPAC Credit Card purchase ground beef for the dining facility totaling \$489.00. The following applies and should be recorded on a Unit Call Sheet. Use the example provided on the following page.

• Issued by: USCG TRACEN PETALUMA

Call Sheet

Attn: Jack-of-the-Dust

• Vendor: Ritz Food Service

P. O. Box 69

Santa Rosa, CA. 95402

- Item information: Ground Beef, 300 lbs. (85-15) at \$1.63 per pound
- IMPAC Credit Card Number: 3294**1234**B123 (record bold numbers to call sheet)
- Requisitioner/Authorized Caller(s): FSC J. L. Eisen/FSCS D. A. Karbo
- Julian Date: 4123 (FY is 94, Julian date is 123)
- Invoice number (from vendor): AP 15861
- Call Number: #001

Note: After placing the order the authorized caller MUST initial the log. Upon receipt of the merchandise you must also record the vendor invoice number on the call sheet to be sent to the Finance Center.

## Practice #7 Call Sheet

#### USCG TRACEN PETALUMA COAST GUARD DINING FACILITY CALL SHEET

MONTH \_\_\_\_\_ YENDOR: RITZ FOOD SERVICE

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# Request for Quotations (SF-18)

The Request for Quotations (SF-18) is used in obtaining price, cost and delivery related information from suppliers for small purchases. You should solicit an SF-18 when a purchase meets one of the following:

- Too many line items to obtain an oral quote.
- Difficulty to get a hold of vendor (e.g. different time zones, unit underway, etc.).
- Complex specifications.

#### Reading Assignment

For information procedures, rules and regulations regarding quotes, read the following in the Small Purchase Handbook:

• Chapter 6 pages 1 through 3

## **SF-18**

Follow the instructions below and refer to example on page 3-26 to **Preparation** prepare the necessary blocks on the SF-18:

> On top of the form enter a check indicating that the small purchase set on page two "is applicable". You must also enter the page numbers in the appropriate block.

Block	Enter
1	Not used.
2	The date the SF-18 is typed.
3	Quote number.
4	Not used.
5A	Address of unit issuing SF-18.
5B	Name and number of point of contact the vendor can call concerning the items.
6	Date items or services are needed.
7	Not used.
8	Vendor's address
9	Address where items are to be shipped or where the services will be performed.
10	Date quotations are to be furnished to you by.
11	Not used.
12	Descriptions of supplies or services requiring quotes and quantity.
13-18	Not used.

### SF-18 Preparation (continued)

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Practice #8

You're at the Coast Guard Academy procurement and have been tasked with soliciting three quotes for a new "walk-in" type freezer for the galley. The following applies:

• Issued by/destination address:

Contracting Officer U.S. Coast Guard Academy New London, CT 06320

• Item information: Hobart Freezer, Model #1010AF

• Requisition number: DTCG-32-95JAD020

• Information name/number: FS2 Your Name Phone number: (332) 525-2738

• Date: 15 Jun 95

• Date quotation required: 15 JUL 1995

• Date item needed: 15 August 1995

Listed below are the three vendors:

- Ape Appliance
   313 N. Main
   Baltimore, MD 04035
- Silva's Appliance 1800 Piner Dr. Alexandria, VA 05986
- Aikman Refrigeration Co.
   12 Stoneypoint Rd
   Glen Burnie, MD 04872

Go to pages 4-15, 4-16 and 4-17 for feedback

#### Amendment of Solicitation/ **Modification** of Contract (SF-30)

The Amendment of Solicitation/Modification of Contract (SF-30) is used to modify existing purchase orders.

#### Reading **Assignment**

Read pages 12D-31 through 12D-44 in the FINCEN SOP.

## **Additional**

An SF-30 is required when modifying or changing the following **Information** Purchase Order (PO) items:

- PO Number.
- Issuing and ship to address.
- Contractor Name and address.
- Accounting and appropriation data.
- Shipping terms.
- Line items: Changes in quantity, or additions/deletions.
- Total order increases of more than \$50.00.
- Cancellation of the PO.

## **SF-30**

Follow the steps below and refer to the example on the next page **Preparation** for instructions on preparing the SF-30:

Block	Enter
1	Contract ID code ( if applicable).
2	Amendment/Modification number.
3	Date SF-30 is prepared.
4	Purchase request number.
5	Project request number.
6	Name and address of unit issuing modification. (Same as block #5 on purchase order you are modifying).
7	Self explanatory
8	Name and address of contractor/vendor. (Block #7 on purchase order you are modifying.).
9A	Self explanatory
9B	Self explanatory
10	Purchase order number of PO you are modifying.
11	Self explanatory
12	Use only for modification of contract.
13A	"FAR part 13".
13B	Self explanatory
13C	Self explanatory
13D	Self explanatory
14	Description of modifications
15A	Self explanatory
15B	Self explanatory
16A	Name and title of contracting officer.
16B	Self explanatory
16C	Date the contracting officer signs SF-30.

#### SF-30 Preparation (continued)

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US COAST GUARD ACADEMY						
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NEW LONDON, CT. 06320						
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#### **Practice #9**

Prepare a SF-30 based on the procurement request seen on the following page modifying the purchase order from practice #4. The following applies:

• Date of SF-30: 27 SEP 97

• Modification number: 001

• Modification will be signed by SKC F. L. Reams on 27 SEP 97.

## Practice #9 (continued)

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Go to page 4-18 for feedback

### **Chapter 3**

#### **Government Procurement**

Introduction

In this section you will learn to prepare the following forms to complete purchases from government sources.

- SF 44 "Green Sheet" Multi line requisition form
- CG 4940 Requisition Log

References

You will need the following manuals to complete this section.

- Supply Policy and Procedures Manual(COMDINST M4400.series)
- Finance Center SOP (FINCENSTINST M7000.series)

### Federal Supply Catalog

The Federal Supply Catalog is a government - wide program administered by the General Services Administration (GSA) and the Department of Defense (DOD).

Each item of supply included in the Federal Supply Catalog has its own National Stock Number(NSN). The NSN consists of a 4 digit Federal Supply Classification code (FSC) and a nine digit National Item Identification Number

## Reading Assignment

Read part III chapters 1 and 2 in the Supply Policy and Procedures Manual.

continued on the next page

#### **MILSTRIP**

The word MILSTRIP stands for MILitary Standard Requisitioning and Issue Procedure. The MILSTRIP system provides the requisitioned with a common language for making their requirements known and the means for supply sources to automate the processing of requisitions. The main features are:

- Reduction of data to an abbreviated form for machine processing.
- Processing requisitions and issuing material on a Multi Line Iten (form SF344)
- Processing requisitions and issuing material on a Requisition Log (CG-4949), and
- Application of a uniform issue priority system to establish the delivery requirement in specific time frames.

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#### **ARMS**

Automated Requisition Management System is the standardized requisitioning system authorized for all Coast Guard units. It is a user friendly system which allows the user to initiate requisitions and follow- on actions through a standard workstation.

## Reading Assignment

- Read part VI, Chapters 1 and 2 in Supply Policy and Procedures Manual
- Read Section E page 12E-4 paragraph 7 on Reserved Fund Codes in the Finance Center SOP
- Read Section E pages 12E-10 through 12E-14 for information on ARMS.

Multi-line Item Requisition Form SF 344 The SF344 is a multi-line item requisition form. This means that any number of different items may be ordered by using one form, rather than a separate form for each item. In most instances the requisitioner will fill out the lower portion of the form and submit it to the supply office for processing.

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SURF Requisition Log (CG-4940)

The SURF Requisition Log (CG-4940) is also a multi-line item requisition form. As with the SF-344 the requisitioner fill out the appropriate ordering information i.e. stock number, unit of issue, quantity desired, cost, fund code (if known), obligation amount and nomenclature. The form is then forwarded to the supply office for processing.

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Practice #1 You have been tasked with ordering the following items on a SF344.

ITEM	U/I	STOCK NUMBER	QUANTITY	COST
SCRUB BRUSH	EA	7920-00-061-0038	3	\$2.48
OVEN CLEANER	GL	7930-01-075-0776	4	\$3.69
POLISHING PADS	вх	7920-00-891-7573	1	\$29.32
GRIDDLE SCREEN	вх	7920-01-162-6064	1	\$31.68
HOLDER, SCOURING PADS	KT	7920-01-222-3521	1	\$12.52
MEMORANDOM BOOK	EA	7530-00-222-3521	4	\$1.43
BALLPOINT PEN	DZ	7520-01-060-5820	2	\$2.35
CARTON OPENER	EA	5110-00-345-5289	1	\$19.50

Go to page 4-19 for feedbacl

Practice #2 You have been tasked to order the following subsistence supplies on a SURF Log (CG-4940)

Item	U/I	STOCK NUMBER	QUANTITY	COST
MARGERINE	LB	8945-00-935-6854	60	0.65
BEANS, REFRIED	CN	8940-00-348-6976	6	3.45
HONEY	JR	8925-01-080-1179	24	2.32
CATSUP	ВТ	8950-00-127-9790	24	1.68
CLOVES, GROUND	CN	8950-00-539-9541	1	12.52
APPLE SAUCE INSTANT	, CN	8915-00-655-5718	24	1.43
BACON,SLICEI PRECOOKED	CN	8905-01-243-0100	6	16.35
CHICKEN	LB	8905-00-582-1340	200	1.78

**CONTINUE TO PAGE 4-20 FOR FEEDBAC** 

### Chapter 4

#### CHAPTER 1 FEEDBACK

PRACTICE #1

FS1 Fiori, on board the USCGC Northwind (D-11), is issuing a cash sub voucher to purchase milk. The program element is NW and the document sequence number is 101. Verify your standard document number against the one listed below.

#### 26-95-315LNW101

FS2 Rollins, on the USCGC Revenge (D-7 MLCLANT unit), is preparing a SF-44 to purchase doughnuts from a local vendor. The program element is RV and the document sequence number is 718. Verify your standard document number against the one listed.

#### 26-95-8053RV718

FSC Ith of Group Mobile (a D-8 unit) is preparing a purchase order to purchase produce. The program element is GM and the document sequence number is 912. Verify your standard document number against the one listed below.

#### 26-95-2958GM912

FSCM McGraw of Base Honolulu (a D-14 unit) wants to set up a blanket purchase order with the local vendor. The program element is BH and the document sequence number is 011. Verify your standard document number against the one listed below.

#### 26-95-3454BH011

continued on the next page

#### Practice # 2

Today is August 31 1995. FS2 Gonzales ordered subsistence supplies with a government VISA card. The vendor is shipping the items today. The VISA card number is 3762928343. The banks transaction sequence number is 1221\*. Write the nonstandard document number for the above transaction on the blank line below.

#### 32-95-0091B0241201

Today is May 4, 1995. FSCS Peters shipped a DFOS using Federal Express. The carriers airbill number is R927523845, the suffix is 112\*. Write the nonstandard document number for the above transaction in the blank line below.

#### 32-95-013489134001

Write the correct DAFIS nonstandard document number for MILSTRIP document number Z2076458930123, on the blank line below.

#### <u>3593202763235009</u>

Note: For this exercise the suffix and sequence numbers are included as part of the DAFIS Accounting Line. However, you CANNOT add these numbers as they are included by the FINCEN.

Write the correct DAFIS nonstandard document number for the below listed GSA customer service order scenario.

Date: 10/02/95 OPFAC: 15222 Ticket #: 98654098

#### <u>3595202680228418</u>

Practice #3 <u>Document Number</u> <u>Document Type</u> <u>AllN Number</u>

21 95 49 5 3TR043 BPA Supply Fund 82

Response: DTCG-49-95-V-TRA043

21 95 27 5 CGR112 Purchase Order UNICOR

Response: DTCG-27-95-W-CGR112

21 95 27 5 LY3235 Delivery Order

Response: DTCG-27-95-F-LY3235

21 95 30 5 RSC098 Agreement

Response: DTCG-27-95-A-RSC098

#### Practice # 4

The year is 1997. FS2 Perkins is aboard USCGC PT. Doran (a D-13 unit) and issues a Purchase Order for program element **PD**, using a document sequence number **404**.

#### DTCG-80-97-S-PD404

The year is 1996. FSCS Malathion is attached to USCG Support Center Portsmouth (a D-5 unit) and is preparing a delivery order for produce. The program element charged for this transaction is **PH**, and the document sequence number is **013**. Verify the number you constructed against the one listed below.

#### DTCG-27-96-V-PH013

The year is 1996. FS2 Pearson, attached to the USCG Reliance (a MLCLANT unit), is typing a Request for Training (SF-182). The program element used is **RL** and the document sequence number is **642**. Verify the number you constructed against the one listed below.

#### DTCG-80-96-F-RL642

The year is 1997. FS1 Prose is attached to USCG Base Honolulu(a D-14 unit), and is preparing a blanket purchase agreement. The program element is **HL**, and the document sequence number is **202**. Verify the number you constructed against the one listed below.

#### DTCG-34-96-V-HL202

CONTINUED ON THE NEXT PAGE

### Practice #5 2/L/XS6/111/82/0/PE/14502/2617

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- 2. REGION/DISTRICT CODE
- 3. APPROPRIATION CODE
- 4. APPROPRIATION LIMITATION CODE (ALC)
- 5. ALLOTMENT FUND CONTROL CODE (AFC)
- 6. ALLOTMENT LEVEL INDICATOR CODE (ALIC)
- 7. PROGRAM ELEMENT (PE)
- 8. COST CENTER
- 9. DOT STANDARD OBJECT CLASS

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#### Practice #2

#### U. S. GOVERNMENT PURCHASE ORDER- INVOICE- VOUCHER DATE OF ORDER ORDER NO. May 14, 1997 2697-287-7RM138 PRINT NAME AND ADDRESS OF SELLER (Number, Sweet, City, and State) Jimmies Fish Market 123 Water Street Key West, Florida 33040-0005 PURPOSE SUPPLIES OR SERVICES TO (Name and address) USCOC Remarks (WLIC 280) CO CO Bean 194 Tread Street Cheriston, SC. 29491-1817 SUPPLIES OR SERVICES QUANTITY UNIT PRICE AMOUNT Swordfish Steaks 10 LBS. 5.75 57.50 Prawns 5.25 15 LBS. 78.75 AGENCY NAME AND BILLING ADDRESS 136.25 CO(2617) TOTAL USCG Finance Center DESCOUNT TERMS 1430A Kristina Way DATE INVOICE RECEIVED Chesapeake, VA. 23326-1122 ORDERED BY (Signature and tide) J. R. Peeves, SKC, Contracting Officer PURPOSE AND ACCOUNTING DATA 2/7/XS6/107/82/0/RM/16306/2617 PURCHASER-To sign below for over-the-counter delivery of items RECEIVED BY TITLE DATE SELLER - Please read instructions on Copy 2 PAYMENT S. NO FURTHER INVOICE NEED BE SUBMITTED SELLER BY I certify that this account is current and prop for payment in the amount of MITTEREN ES ACCOUNT VERIFIED CORRECT FOR CASH CHECK NO. STANDARD FORM 44 (REV 10-E) 1. SELLER'S INVOICE PRESCRIBED BY CALA FAR (48CPR) 53-213(e) ZIP CODE ORIGINAL

## Chapter 2 Feedback, Continued

### Practice #3

	Sunstand Form 1146 Revised (6-E3) Department of the Trea I TFRM 4-400 1145-106	RECEIPT FOR CASH—SUBVOUCHER (To be used when fervice to not cyntholic)	Subvacesher No. 104-97  Date 31 July 97
INTERIM RECEIPT FOR CASH	**Two h	Received in cash from USCG C Resolute (WMBC 620) undered thirty nine dollars***********************************	)) for the following:
DATE	QUANTITY	ARTICLES OR SERVICES	AMOUNT
Received of Imprest Fund Cashier  \$	30 LB	Crab, Alaskan King @ 7.99	\$239.70
(Remove)  NOTE TO SIGNER  Be sure this receipt is marked "YOID"		Avenue By	et man in successful
and returned to you when the transaction is completed or the funds returned to the Gashier. "UE Q.P.Q.: 1880-891-887	M. P. Richard	PROJECT, LUNCH  2/6/XS6/121/82/0/RL/:  SKC, CONTRACTING OFFICER  DOC ID # 26-97-2176	CLASSIFICATION 12106/2617

## **CHAPTER 2 FEEDBACK, CONTINUED Practice # 4**

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#### Chapter 2 Feedback, continued

#### **Practice #5**

Compare the following statements with those you completed on page 3-21:

- When placing a call against a BPA, the authorized caller must assign a <u>call number</u>.
- As the vendor supplies the material to the unit, he/she must also provide a **delivery ticket**.
- All calls against a BPA must be recorded on a <u>call record sheet</u> and submitted to Finance Center with delivery tickets <u>monthly</u>.

# Chapter 2 Feedback, continued Practice # 6

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						The district coder is	embject to instructions on historical subject to the ter		
						the short-oranicand	-		
ACCOL	UNTING AND APPRO	OPRIATION DATA		10. REQUIST	TONING O	Zive .			
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				III. BUISHES	OTHE	CATION (CHBCK APPRO	PRIATE BOX(ES))		
				X SMALL	THAN	ADVAN-	WOMEN-		
F. O. B.			14. GOVERNMEN	VT B.A. NO	15 DELLY	TAGED ER TO F. O. B. POINT			
	INATION				ON OF	BEFORE (Day)	16. DISCOUNT	TERMS	
PLACE	OF INSPECTION AND A	ACCEPTANCE	1			ASE AGREEMENT	NET 3	o	
SAM	E AS BLOCK #5		<u>L</u>		SEE SC	HEDULE	1	•	
		17.	SCHEDULE (See	Page 2 for Reject	Lions)		<u> </u>		
ITEM NO.	SUI	PPLIES OR SERVICE		QUANTITY	UNIT	UNIT		lorres	
(A)		(B)	-	ORDERED	(D)	PRICE	AMOUT (P)	T QUAN	
1.	THIS IS A DI AN	WET DE DOLLAR		(5)		(E)			
••	FOR VARIOUS	KET PURCHASE TEMS OR SERVI	AGREEMENT	1 1				- 1	
		TOR MAY BE IN						- 1	
	TO DELIVER TO	THE U. S. COAS	T GUARD.				l	ì	
ı	IF ANY, WHEN	REQUESTED BY	пнв				1	1	
	CONTRACTING	OFFICER OR AN	AUTHORIZED				1	- 1	
- 1	REPRESENTATI	IVE DURING THE	PERIOD OF					- 1	
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	18. SHIPPING POIN	·	HUPPING WEIGHT		20. INVOICE	INO.		17(H).	
RAULING TRUCTION	18. SHIPPING POIN	T 19. GROSS SI			20. INVOICE	I.NO.		(00	
TRUCTION ON	18. SHIPPING POIN	T 19. GROSS SI			20. INVOICE	NO.		(cx	
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TRUCTION ON EVERSE	18. SHIPPING POIN 21. MAIL INVOICE SAME AS	T 19. GROSS SI CB TO: (Inchase ZIP Co S BLOCK #5				NAME (TYPED)		17(0). GRA	
TRUCTION ON EVERSE	18. SHIPPING POIN	T 19. GROSS SI CB TO: (Inchase ZIP Co S BLOCK #5					SC, USCG	17(0). GRA	
ON VERSE	18. SHIPPING POIN 21. MAIL INVOIC SAME AS	T 19. GROSS SI CB TO: (Inchase ZIP Co S BLOCK #5				NAME (TYPED)	•	17(I). GRA TOT	

## Chapter 2 Feedback, continued Practice Exercise, #6 continued

4.

DATION Much all packages and papers with control and/or order numbers  DATION CLOSE.  OL OCT 97  CONTRACT NAMES. DTCG31-97—VFN001  2. EXTENT OF OBLIGATION: The Governments not obligated to order any supplies or services wander this agreement. The Government is other vendors for like supplies or services during the same period of this agreement. The Government is obligated noder this Agreement only to the extent of authorized calls actually placed against this Agreement.  3. PURCHASE LIMITATIONS: An individual call placed under this Agreement shall not exceed \$2,500.00.  4. PRICING COMPLIANCE: The vendor warrants by performance of any call piaced under this Agreement shall not exceed \$2,500.00.  4. PRICING COMPLIANCE: The vendor warrants by performance of any call piaced under this Agreement shall not exceed \$2,500.00.  5. PURCHASE LIMITATIONS: An individual call placed under this Agreement shall not exceed \$2,500.00.  6. PRICING COMPLIANCE: The vendor warrants by performance of any call piaced under this Agreement shall not allow or lower than those charged the Government shall be as low or lower than those charged most favored customs for companible quantities under similar terms and conditions including my	PAGE NO. 2 of 3	
OIL OCT 97  DTCG31-97-VFN001  SUPPLES OR SERVICES OF SHOPLES OR SERVICES OF CHARGE OF		
NO. SUPPLES OR SERVICES  (A)  2. EXTENT OF OBLIGATION: The Governments into obligated to order any supplies or services suder this agreement. The Government reserves the right to award contracts or agreements to other vendors for like supplies or services during the same period of this agreement. The Government is obligated where this Agreement only to the sattest of authorized calls actually placed against this Agreement.  3. PURCHASE LIMITATIONS: An individual call placed under this Agreement shall not acceed \$2,500.00.  4. PRICING COMPLIANCE: The vendor warrants by performance of any call placed under this Agreement that the prices charged the Government aball be as low or lower than these charged most favored customess for compensible quantities under similar terms and conditions including any		
2. EXTENT OF OBLIGATION: The Governments not obligated to order any supplies or services water this agreement. The Government services the right to award contracts or agreements to other vendors for like supplies or services during the same period of this agreement. The Government is obligated under this Agreement only to the extent of authorized calls actually placed against this Agreement.  3. PURCHASE LIMITATIONS: An individual call placed under this Agreement shall not exceed \$2,500.00.  4. PRICING COMPLIANCE: The vendor warrants by performance of any call placed under this Agreement shall not exceed \$2,500.00.  4. PRICING COMPLIANCE: The vendor warrants by performance of any call placed under this Agreement that the prices charged the Government shall be as low or lower than those charged most fevored creatomens for comparable quantities under similar terms and conditions including any	QUANTITY	
placed under this Agreement shall not exceed \$2,500.00.  4. PRICING COMPLIANCE: The vendor warrants by performance of any call placed under this Agreement that the prices charged the Government shall be as low or lower than those charged most favored crustomans for comparable quantities under similar terms and conditions including my	<u> </u>	
PRICING COMPILANCE: The vendor warrants by performance of any call placed under this A greement that the prices charged the Government shall be as low or lower than those charged most favored mustomas for company bis quantities under similar terms and conditions including any		
discounts for prompt payments. The vendor shall provide current pricing catalog to punchasing office, if and when requested by the Contracting Officer.		
5. ORDERING PROCEDURES AND LIMITATIONS:  a. Call Orders: Calls placed under this Agreement will generally be made by oral solicitation without written confirmation by the Government - such call will be assigned an identification number.		
The identification number along with the BPA number shown on the First page of this agreement shall be used when calls are placed by the ordering scitvity and the vendor in the preparation of delivery tickets and invoices.		
b. AUTHORITY TO PLACE CALLS: ALL CALLS PLACED WITH THE VENDOR UNDER THIS AGREEMENT MUST BE ACCOMPANIED BY A BPA "CALL NUMBER" AUTHORIZED BY THE CONTRACTING OFFICER THE ROSTER BELOW INDICATES THOSE PERSONNEL WHO HAVE BEEN GRANTED AUTHORITY TO PLACE ORDERS AND COMMIT GOVERNMENT FUNDS.		
Personnel who are authorized to place calle:  CWO2 B. Parker  FSC A. Genzales  FS1 M. Delaney  FS2 Y our Name		
TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 17(H))		

Continued on next page

OPTIONAL FORM 348(10-83) Prescribed by GSA FAR (46CPR) 53.213(e)

# Chapter 2 Feedback, continued Practice Exercise, #6 continued

		FOR SUPPLIES OR SER DULE - CONTINUATION					3 of 3
MPORTA	NT: Mark all packages and papers with	matract and/or order numbers			<del></del>		
ATBOFC	01 OCT 97	DTCG31-97VFN001			2698317VFN001		
TEM IO. A)	SUPPLIES OR SEC		ORDERUED	UNIT (D)	UNIT PRICE	AMOUNT	QUANTIT
6.	DELIVERY TICKETS: All shall be accompanied by a significant contains the following	shipments under this agreement med delivery ticket or sales slip minimum information:	6		•		
	a. Name of vendor.			İ			
	b. Black , chass	Agreement number.					
	c. Date or sail.						
		e and extension of each line item					
	f. Date of delivery, p						
	g. Call identification	number.					
	h. Signature of Coast	Guard moniving official.					
7.	for those deliveriesactually billing period shall be most list of the delivery tickets of amount of each and the tota accompanied by signed deli-	very tickets. The original invoice y tickets, shall be mailed to the					
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OPTIONAL FORM 348(10-83) Prescribed by GSA FAR (44CFR) 53.213(a)

## Chapter 2 Feedback, continued Practice Exercise #7

## USCG TRACEN PETALUMA COAST GUARD DINING FACILITY CALL SHEET

MONTH \_\_\_\_\_ VENDOR: RITZ FOOD SERVICE ADDRESS: P. O. BOX 69

				SANTA ROSA, ( .: (800) 998-90		
			POC:	(550) 555 55	. •	
CALL		FSC J. L. EISEN FSCS D. A. KAF		TURE:		
CALL #	J DATE	CALLER	INVOICE #	AMOUNT	EX TOTAL	VISA #
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			•	SUB TOTAL		
		T		LESS CREDIT	rs	
ACCT: 2/Q	)/XS6/174/PT	/0/82/61200/2617	C	GRAND TOTAL	489.00	
			4	Cont	inued on r	ext pag
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# Chapter 2 Feedback, continued Practice Exercise, #8

REQU	EST FOR QUOTATION IIS IS NOT AN ORDER)	S THE M	OTICE OF SMALL BUTE	TRIS - SHALL FURCHASE SET	AFEDE ON	PAGE 1 OF THE POS	<u>.</u>	PAGE OF PAGES
L REQUE	T NO. 2 DATE I	ne 1995	3. REQUESTION/PUR	CHASE BEOVERNO		T. FOR NAT. DEF.	_	RATING
SA. INC.	D 87		D1CG32-	95JYE020	AND	er bosa bisg. 1 For das bisg. 1 Iver by (Dag)	<u> </u>	TOTAL TOTAL
	ONTRACTING OFFICE S COAST GUARD ACA					15 August 1	995	
NE	W LONDON CT 0632	Λ.			7. DIE.	WERY BY		
FS	2 Your Name (332) 525-		V	· · · · · · · · · · · · · · · · · · ·		OS WIDNATION		<b>— отна</b>
& NAME A	NO ADDRESS INCLAIDING MY CODE	2730		· · · · · · · · · · · · · · · · · · ·	P. DEST	TINATION (Comignos)		initialing
A					27			
	e Appliance 3 N. Main					NTRACTIN		PFFICER D ACADEMY
Ba	ltimore, MD. 04035					W LONDO		
10 27 21 22								
DOM: THE	FURNISE QUOTATIONS TO THE GOFFICE ON OR REPORE CLOSE PRIME (Date)	II. BUIDNESS	CLASSIFICATION (Che	eg uldanderen perme)	<u> </u>			
7/	15/95	Памил		ER THAN SMALL				
IMPORTA	ANT: This is a request for information, so	4 4			DEADVA!		Ц,	OHEN-OWNED
supplies or	his request does not commit the Governme services. Supplies era of domestic origin to Quotations must be completed by the quo	mien otherwis						
			(include applicable Fede	ral, state and local texter)				
ITEM NO.	SUPTLINEON (b)	RVICES		QUANTITY (e)	UNIT (d)	UNIT PRICE		AMOUNT
1.	FROSTLINE FREEZE	R. WAL	K-IN.	1	EA	(e)		<u> </u>
	MODEL #98SD	,		1	LA			
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1								
	UNT FOR PROMPT PAYMENT		CALENDAR DAYS	% CALENDAR DATE		OARDAYS		CALENDAR DAYS
NOTE: Pa	ge 2 must also be completed by the q O ADDRESS OF QUOTER (Sees, sty, sees)	outez.						
ZIP Code)	(,	,, <del></del>		15. SIGNATURE OF PERSO QUOTATION	ORTUA PC	REED TO EIGH		14. DATE OF QUOTATION
				17. NAME AND TITLE OF	ECHER (T	)po er Print)		15. TELEPHONE NO.
NEN 7540-01 PREVIOUS E	1-152-8064 PORTION NOT USABLE					Preser	and by 0	) PORM 18 (Rev. 10-83) MA 33-215 - 1(a)

# Chapter 2 Feedback, continued Practice Exercise, #8 continued

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L RIIQUIN	T NO.	15 June		DTCG32-95J	LES REQUEST NO.	LDebe	FOR NAT. DEF.	RATING		
CC	NTRACTING C	FFICER				. DEEL	WER BY (Does)	<u> </u>		
	COAST GUAR					15	August 1995			
NE	W LONDON, C	T. 06320				. DEEL	RRY SY			
FS	2 Your Name (33	2) 525-2					B PTINATION	OTHER CHEDULE)		
S. NAMEA	NO ADDRESS INCLUDING I	IP CODE				P. DEST	INATION (Consigner and adds			
Q:1	riola Ampliana					CO	NITIO A CITITATOS O	VEELCED.		
	va's Appliance 00 Piner Dr.					CONTRACTING OFFICER US COAST GUARD ACADEMY				
		∞8 <b>6</b>					W LONDON, C			
	·						·			
DBBLDN:	E PURNERE QUOTATIONS TO G OPPICE ON OR NEPORE C	THE I	1. BUTENESS (	TAREFICATION (Cheek of	And largests partition)	<u> </u>				
	/15/95		_	_	-					
	•		☐ swarr	-		DEFADYAN		WOMEN-OWNED		
supplies or	NT: This is a request for in: his request does not commit servicus. Supplies are of doe Quotations must be complet	nertic origin an	less otherwise							
ITEM NO.		12. 30	HEDULE (	achele applicable Federal,	state and local taxes)					
(a)		SUPPLICATERY (b)	VIICENS		QUANTITY (a)	UNIT (d)	UNIT PRICE (e)	AMOUNT		
1.	FROSTLINE F	REEZER	, WALI	K-IN.	1	EA		<del>                                     </del>		
	MODEL #98SI			,	1					
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13. DISCO	UNT FOR PROMPT P	AYMENT	10 0	ALENDAR DAYS	20 CALENDAR DAYS	> CALES	DARDAYS	CALENDAR DAYS		
NOTE: P	ngo 2 must also be comple	sed by the on	Terr.	%	%		%	%		
14. NAME A	NO ADDRESS OF QUOTES (S		<b></b>		15. SIGNATURE OF PERSO	N AUTHO	IZED TO SECH	14. DATE OF QUOTATION		
	•				QUOTATION					
					17. NAME AND TITLE OF	IIGNES (T	ma or Polari	18. TRLEPHONE NO.		
						(*)		(Instate ora eats)		
NSN 7540-6	01-152-3064 EDITION NOT USABLE						STANDAL	RD FORM 18 (Rev. 10-83)		
, 1000	HOL GARLE						FAR (44 CF	y CNEA R) 33.225 - 1(a)		

## Chapter 2 Feedback, continued Practice Exercise, #8

REQU	EST FOR QUOTA	ER)	X 2	IN NOT A	TLICAL	E - SMALL FURCEASE SET	- ASSECTE OF	PAGE 2 OF THE POL	¥	PAGE	QF P	AGE
		15 June 19	95	DTCG3	2-95]	AD020	UN	T. POR NAT. DEF. DER BOSA MIG. 2		RATING	<u> </u>	
US NE	ONTRACTING O S COAST GUARI EW LONDON C	D ACADEM			-		s. per	OVER BY (Doe)	Aug	ust 1995		
SB. POR IN	WORMATSON CALL! (Name and						٦,,	06				
L NAME A	2 Your Name (33)	2) 525-2738					ه با	TENATION (Charless or				9
12	KMAN REFRIGE Stony Point Road en Burnie, MD. 04		CO.				US	DNTRACTIN COAST GUEW LONDON	AR	DACAD	ЕМҮ	
OF BUI	E PURITER QUOTATIONS TO: 14 OFFICE ON OR MIFFORE CLA 15/95	000	ENIEM CL	AMERICATION		PEAN SMALL				-	<del></del>	- u.
supplies or	ANT: This is a request for info this request does not commit in services. Supplies are of dom- r Quotations must be complete.	emation, and quotasi	ons famili	ed are not offer	a. If yo	ere unable to quote, please	DEFADYA so indicate quotation lections ac-	on this form and	<u> </u>	VOMEN-OWNE	• ••••••	
ITEM NO.		12. SCHEDU	LE (bec	inde applicable	Federal,	state and local texts)		<del> </del>				
(a)		(b)				QUANTITY (e)	UNIT (d)	UNIT PRICE			MOUNT 8)	
1.	FROSTLINE FE MODEL #98SD					1	EA					
	UNT FOR PROMPT PA			ENDAR DAYS	%	20 CALENDAR DAYS		MDAR DAYS		CALEN	DAR DAY	
NOTE: Pa	go 2 must also be complete O ADOSESS OF QUOTES (300)	d by the qouter.				15. SIGNATURE OF PERSO QUOTATION	<u> </u>			14. DATE OF	CTATOUS	% on
						17. NAME AND TITLE OF	IIGNER (T	)yes or Poloci)		18. THLEPHO		
NSN 7546-01 PREVIOUS E	I-19-1004 EDITION NOT USABLE							Frank		PORM 18 (E. MA 53-215 - 1/4)	w. 10-83)	

## Chapter 2 Feedback, continued Practice Exercise, #9

AMENDMENT OF SOLICITATIO	N/MODIFICATION O	FCONTRACT	1. CONTRACT ID CODE	PAGE OF PAGE
R. AMENOMENT/MODIFICATION NO.  0001	27 SEP 97	4. REQUISITION/PURC 219728877]		PROJECT NO. (# applicable)
. ISSUED BY COD	€	7. ADMINISTERED BY	(If other then item 8)	CODE
CONTRACTING OFFICER				
USCG Station Fort Pierce				
Panama City, FL. 86754-0030	)			
NAME AND ADDRESS OF CONTRACTOR (No., 2500) COLE	ny, State and ZZIP Code)		(/) SA. AMENDMENT O	F SOLICITATION NO.
MARY'S Cake Decorating Sup	plies			
67823 Market Street	<b>F</b>		SE. DATED (SEE IT	EM 11)
Fort Pierce, FL. 23773			,	
Phone: (211) 555-5555			10A. MODIFICATION	N OF CONTRACT/ORDER NO.
,,			DTCG28-	97-P-FP314
			A	
COE	FACILITY CODE		25 SEP 9	•
11. Th	IS ITEM ONLY APPLIES	TO AMENDMENTS OF		<del>//</del>
D. OTHER (Specify type of modification and authority)	copies of the aminegram which includes a THE PLACE DESIGN NOF YOUR OFFER. If rowlded each telegram or let ward)  FEM APPLIES ONLY TO A DIFFES THE CONTRACT/ Specify surfacily) THE CHANGES IF F.A.R. PART 13  IED TO REFLECT THE ADMINISTRY OF PAR 43.1936).  TO PURSUANT TO AUTHORITY OF PURSUANT TO AU	endment (b) By acknow reference to the solicit ATEO FOR THE RE by viture of this amend with the solicit makes reference to the makes refe	wiedging receipt of this ame tation and amendment num CEIPT OF OFFERS PRI ment you desire to change ne solicitation and this amendment you desire to change ne solicitation and this amendment you desire to change ne solicitation and this amendment you desire to change ne solicitation and this amendment you desired the service of the issuing copies of the issuing and subject matter where feasible.	endment on each copy of the inbers. FALURE OF YOUR OR TO THE HOUR AND a confer already submitted, diment, and is received prior to each with the confer already submitted, diment, and is received prior to each with the conference of the conference
INCREASE	\$50	0.00		
OLD PURCHASE OR	DER TOTAL: \$290	0.00		
mapt as provided herein, all terms and conditions of the de-	surrient referenced in Nam SA and	10A, so heretelere changed,	remains unchanged and in full fore	ie and offici.
A. HAME AND TITLE OF BIGHER (Type or Privil)		16A. HAME AND TITLE O	CONTRACTING OFFICER (Type o	r princ)
		F. L. Ream	s SKC, USCG	
B. CONTRACTOR/OFFEROR	1SC. DATE SIGNED	168, UNITED STATES OF	AMERICA	19C. DATE SIGNED
(Signature of Contracting Officer)		<u> </u>		27 SEP 97
SM 7540-01-152-0070 REVIOUS EDITION UNUSABLE		S	Persor	DARD FORM 30 (Rev. 10-83) ribed by GSA us CFR) 53.243

## Chapter 3 Feedback Practice Exercise, #1

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M. MINAMO	#	1	7-34		- 25	5	я		•	45- 3		4-4		2-2	<b>23-25</b>	21 - 32		13-20	8-11
UB BRUSH \$2.48	S													3	BA		038	00-061-0	7920
N CLEANER \$3.6		1	_1_	Ц		-	-							4	GL		776	01-075-0	7930
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DER \$12.52	F	+				-	-	<del></del>						1	KT			01-222-7	7920
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LPOINT PEN \$2.35	E	+				-	-							2	DZ			01-060-5	7520
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# Chapter 1 Feedback, continued Practice Exercise, #2

-	THE TOTAL SECTION SECT					SURF I		ITION LO	G				UserForFact HUADANA SHEET HUADANA (19
5 <b>.5</b> (. 6)	60 L	MC MAG	CO.	QUANTITY (7)	(9)	DOCUMENT HUMBER DATE SEMAL (9) (10)	CODE	AMEDIATE (12)		DATE HECHYSID (13)	ACTUAL COST		11-11111 1
		8945-00-935-6854			.65	*	XN	\$39.00	Ť		1-13-	f	Margarine, 1 lb. prints
		8940-00-348-6976	CN	00006	3.45		XN	\$20.70	-		<del>                                     </del>	H	Bosns Refried, #10
		8925-01-080-1179	邒	00024	2.32		XN	\$55.68	-		<del>                                     </del>	H	Honey
		8950-00-127-9790	BT	00024	1.68		XN	\$40.32	•		<del>                                     </del>	H	Catana, Tomate
		8950-00-539-9541	CN	00001	12.52		XN	\$12.52	-			H	Cloves, Ground
		8915-00-655-5718	_		1.43		XN		-			Н	Applorance, Instant
		8905-01-243-0100	LB	00006	16.35		XN	398.10	-			Н	Bacon, Sliced, Precorded
		8945-00-935-6854	LB	00200	1.78		_	\$356.00	-		<del>                                     </del>	Н	Chicken
I			Π						П		<del>                                     </del>	Н	Cistato
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## **Chapter 5**

## **DAFIS Accounting check off sheet**

Directions	The student has just practiced performing the tast interpret and construct DAFIS accounting lines. student an additional scenario to test their level of the check-off sheet below as a guide, and the mastandard	Provid of profi	le the ciency. Use	
	Did the student construct and interpret:	YES	NO	
	<ul> <li>DAFIS accounting line I.A.W. FINCEN SOP</li> </ul>		. <u></u>	
	<ul> <li>DAFIS standard document number I.A.W. FINCEN SOP</li> </ul>			
	<ul> <li>DAFIS non-standard document number I.A.W. FINCEN SOP</li> </ul>		. <u></u>	
	<ul> <li>Acquisition Instrument Identification Number (AIIN) I.A.W. FINCEN SOP</li> </ul>	•		

### **Purchase Order Check Off Sheet**

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The student has just practiced performing the tasks necessary to execute a small purchase using a Purchase Order (CG-5398, OF-347). Provide the student an additional scenario to test their level of proficiency. Use the check-off sheet below as a guide, and the manuals as the standard

Did the student?	YES	NO
Obtain price quotes		
<ul> <li>Prepare a Procurement Request (DOT F 4200.series) and submit to supervisor for approval</li> </ul>		
<ul> <li>Prepare Purchase Order and submit to supervisor for approval</li> </ul>		

## **Imprest Fund Check Off Sheet**

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The student has just practiced performing the tasks necessary to execute a small purchase using Imprest Funds. Provide the student an additional scenario to test their level of proficiency. Use the check-off sheet below as a guide, and the manuals as the standard

Did the student?	YES	NO
• Obtain price quotes		
• Prepare a Procurement Request (DOT F 4200.series) and submit to supervisor for approval		
<ul> <li>Prepare Receipt for Cash Sub voucher (SF-1165) and submit to supervisor for approval</li> </ul>		

#### SF-44 Check-Off Sheet

Directions	Š

The student has just practiced performing the tasks necessary to execute a small purchase using Purchase Order-Invoice-Voucher (SF-44). Provide the student an additional scenario to test their level of proficiency. Use the check-off sheet below as a guide, and the manuals as the standard

Did the student?	YES	NO
• Obtain price quotes		
• Prepare a Procurement Request (DOT F 4200.series) and submit to supervisor for approval		
• Prepare Purchase Order-Invoice-Voucher (SF-44) and submit to supervisor for approval		

#### **Blanket Purchase Agreement Check-Off Sheet**

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The student has just practiced performing the tasks necessary to execute a small purchase using a Blanket Purchase Agreement. Provide the student an additional scenario to test their level of proficiency. Use the check-off sheet below as a guide, and the manuals as the standard

Did the student?	YES	NO
Obtain price quotes		
<ul> <li>Prepare a Procurement Request (DOT F 4200.series) and submit to supervisor for approval</li> </ul>		
<ul> <li>Prepare Purchase Order(CG-5398, OF-347) and submit to supervisor for approval</li> </ul>		

#### **Credit Card Check-Off Sheet**

#### **Directions**

The student has just practiced performing the tasks necessary to execute a small purchase using a Government-wide Commercial Credit Card. Provide the student an additional scenario to test their level of proficiency. Use the check-off sheet below as a guide, and the manuals as the standard

Did the student?	YES	NO
• Enter the call number		
• Record the Julian date		
• Execute small purchase		
• Initial the log		
Record the vendor invoice number		
• Enter the last four numbers from the credit card		
Record the amount of merchandise ordered		

#### SF-30 Check-Off Sheet

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The student has just practiced performing the tasks necessary to modify an existing purchase order. Provide the student an additional scenario to test their level of proficiency. Use the checkoff sheet below as a guide, and the manuals as the standard

### Multi-line Item Requisition Form (SF 344) Check-Off Sheet

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The student has just practiced performing the tasks necessary to execute a small purchase using a Government wide commercial Credit Card. Provide the student an additional scenario to test their level of proficiency. Use the check off sheet below as a guide, and the manuals as the standard.

Did the Student?	YES	NO
Enter the FSC number		
Enter the NIIN		
Enter the unit of issue		
<ul> <li>Enter the quantity in 5 digits</li> </ul>		
<ul> <li>Enter the name price and total in the remarks block</li> </ul>		
<ul> <li>Enter the sheet total below the final Item</li> </ul>		
<ul> <li>Record the amount of merchandise Ordered</li> </ul>		

continued on the next page

## Multi-line Item Requisition Form (SF 344) Check-Off Sheet continued

Directions	D	ir	e'	ct	i	0	n	S
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The student has just practiced performing the tasks necessary to execute a small purchase using a SURF Requisition Log, (CG-4940). Provide the student an additional scenario to test their level of proficiency. Use the check-off sheet below as a guide, and the manuals as the standard.

Did the student?

		YES	NO
•	Enter the stock number		
•	Enter the unit of issue		
•	Enter the quantity in 5 digits		
•	Enter the unit price		
•	Enter the correct fund code		
•	Enter the obligation amount		
•	Enter the correct nomenclature		
•	Enter the unit price  Enter the correct fund code  Enter the obligation amount		

continued on the next page

### **Procurement Check - Off Sheet**

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If the answer to any of the questions was NO, explain to the student where the errors were made and direct the student to go back and redo the practices for that particular task. Once you are convinced that the student can perform the objectives in accordance with the appropriate references and standards, sign this sheet and performance qualifications D.5.01., D 5.02, D 5.03.

Date	 -		
Supervisor:_	 		

**Stop here**